New Hire Action

<div style="float:right">**PA40**</div>

Change History

Update the following table as necessary when this document is changed:

Date	Name	Change Description
11/1/04	Marie Dunlap	Per SIR 499, Personal Holiday quota creation upon hire – referenced Maintain Quota Balance script.
11/15/04	Emilie Miller	Edit 1
4/15/05	Kathy Henry	Added notes to Bank Detail field descriptions and to General Benefits entry. Incorporated some new standards.
7/20/05	Kathy Henry	Removed highlighting on changed text; added boilerplate text for messages; This procedure incorporates the entire hire flow.
11/16/05	Chylynn Hansel	Edits
12/13/05	Chylynn Hansel	Edits
5/3/06	Chylynn Hansel	Edits
6/12/06	Chylynn Hansel	Edits
7/7/06	Chylynn Hansel	Edits
7/17/06	Chylynn Hansel	Edits
8/11/06	Lesa Terry	Update Bank Details information
9/6/06	Lesa Terry	Update Tax exemption information

Purpose

Use this procedure to hire a new employee or rehire a former state employee who was not converted into HRMS.

Trigger

Perform this procedure when a new employee or former state employee, who was not converted, into HRMS is being entered into HRMS for the first time.

Prerequisites

• An employee must have been hired into State service and completed a New Hire Information Packet.

Menu Path

• Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions

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Transaction Code

PA40

Helpful Hints

- Personal Holiday quotas are only created by the system at the beginning of a year. Employees who are hired after the beginning of the year and are entitled to a Personal Holiday will need to have their quota entered manually. See OLQR procedure Quota Accrual Generate Manually to lead you through this process.

- If you are hiring a former employee that has not been converted in to HRMS, contact the HRISD helpdesk at 360-664-6400 or helpdesk@dop.wa.gov to get the employee's personnel ID number out of the data warehouse.

- This procedure my require hand-offs to other roles (payroll processor and /or benefits processor) depending on the structure of your agency and your role at your agency.

- It is critical if a hand-off is made to anther role, that the transaction code **PA40** is used and the "*execute into infogroup*" process is used. This is explained further in this procedure. Using **PA40** will ensure that all required infotypes are completed.

- Do not use transaction code **PA30** to complete portions of the appointment change action.

- The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

Message Type	Description
Error	**Example**: Make an entry in all required fields. **Action**: Fix the problem(s) and then click (Enter) to proceed.
Warning	**Example**: Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. **Action**: If an action is required, perform the action. Otherwise, click (Enter) to proceed.
Confirmation or	**Example**: Save your entries. **Action**: Perform the required action to proceed.

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Procedure

1.   You have started the transaction using the menu path or transaction code **PA40**.

Personnel Actions

2.   Perform one of the following:

If	Go To
You are the **Personnel Administration Processor**	Step 3
You are the **Payroll Processor**	Step 57
You are the **Benefits Processor**	Step 79

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3. Complete the following field:

Field Name	R/O/C	Description
From	R	The effective date of the new hire appointment. Only enter the *From* date if you are the **Personnel Processor** initiating the appointment change action. **Example:** 6/4/2006

4. Click the gray box to the left of New Hire to select.

5. Click (Enter) to validate the information

6. Click (Execute).

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Create Actions

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
7. Complete the following fields:

Field Name	R/O/C	Description
Reason for Action	R	The reason that an action has been performed. **Example:** 02
Position	R	The position number. **Example:** 60000117

8. Click ☑ to validate the information.

Information

9. Click ☑ to accept.

10. Click ☑ to validate the information.

The employee's personnel number will now be generated.

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Create Actions

11. Click 🖫 to save.

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Create Personal Data

12. Complete the following fields:

Field Name	R/O/C	Description
Last name	R	The legal last name of an employee as indicated on the social security card. **Example:** Smith
First name	O	The legal first name of an employee as indicated on the social security card. **Example:** Sally

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Field Name	R/O/C	Description
SSN	R	A 9 digit number assigned by the Social Security Administration. **Example:** 432567877
Date of Birth	R	The basic value used to calculate a person's age. **Example:** 05/25/1943
Marital status	R	The marital status of the employee, i.e. single, married, divorced, etc. **Example:** Single

13.   In the Gender field, click ○ Male or ◉ Female .

14.   Click 🗸 to validate the information.

ℹ️   The start date on the *Create Personal Data* (0002) infotype will be the employee's birthday.

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Create Personal Data (0002)

15. Click 🖫 to save.

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Create Organizational Assignment

16. Complete the following field:

Field Name	R/O/C	Description
Contract	R	The employee's state status. **Example:** Probation

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Field Name	R/O/C	Description
Org. key	O	The pay distribution location. **Example:** 4000
Time	O	The time data administrator is responsible for the employees assigned to him or her. **Example:** DA

17. Click ![Enter icon] (Enter) to validate the information.

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Organizational Assignment (0001)

18. Click 🖫 (Save) to save.

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Delimit Vacancy

This screen will only appear if there is a vacancy that will be delimited by the new hire.

19. Click [Yes] to delimit the vacancy.

Create Contract Elements

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20. Complete the following fields:

Field Name	R/O/C	Description
Contract type	R	The status of employment within the State. It will be either Permanent or Non-permanent. **Example:** Non-Permanent
Probationary period	O	The length of employee's probationary period. **Example:** 6 Months

21. Click (Enter) to validate the information.

Contract Elements (0016)

22. Click (Save) to save.

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Create Monitoring of Tasks

23. Complete the following fields:

Field Name	R/O/C	Description
Task Type	O	A task type is a relevant task that an HRMS user would be expected to perform. **Example:** Prob per to expire
Date of Task	O	The date on which the task needs to be completed. **Example:** 01/25/2005
Processing indicator	O	This is used to signify if a task entered in the Monitoring of Tasks infotype is new, in process, or has been completed. **Example:** New task
Reminder Date	O	The date on which the system should remind you of a certain task. **Example:** 6/1/2005
Lead/follow-up time	O	The lead/follow-up time defines a period before or after which the system should remind you of a certain task. **Example:** 1 month

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24. Click (Enter) to validate the information.

Monitoring of Task (0019)

```
 Infotype  Edit  Goto  Extras  System  Help
```

Create Monitoring of Tasks (0019)

Personnel No.	20001064	Name	Smith Sallie S
PersArea	1110 Dept of Personnel	EEGroup	0 Permanent
PSubarea	0001 Non Represented	EESubgroup	01 Monthly(M) OT Exem... Status Active

Task

Task Type	Prob per to expire
Date of Task	12/04/2006 Processing indicator New task

Reminder

Reminder Date	11/04/2006
Lead/follow-up time	

![info] You can run the monitoring of task report, transaction code **S_PH0_48000450** to get the reminder tasks and dates.

25. Click (Save) to save.

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Create Addresses

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26. Complete the following fields:

Field Name	R/O/C	Description
Address type	R	The type of address for this infotype **Example:** Permanent residence You can also select mailing address from the drop down list. If the employee provides a permanent residence and mailing address you can only complete one type during the New Hire Action. To enter another address type follow the procedure Addresses Create and Maintain that is located in the OLQR.
Street/House no.	R	The residential street address of an employee. **Example:** 123 Elm Lane
Postal code / city	R	The 5 or 9 digit zip code and city the employee resides in. **Example:** 98498/Lakewood
Country Key	R	The county the employee resides in. This will default in as USA. **Example:** USA
Office/region	R	The State in which the employee resides. **Example:** WA
County code	R	The code for the county in which the employee resides. **Example:** 27
Telephone number	O	The home phone number of an employee. **Example:** (253)555-5555

27. Click (Enter) to validate the information.

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Addresses (0006)

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  Infotype  Edit  Goto  Extras  System  Help

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  Create Addresses (0006)

  📄 📄 👤   Foreign address

  Personnel No.   20001064      Name      Smith Sallie S
  PersArea   1110  Dept of Personnel              EEGroup 0 Permanent
  PSubarea  0001  Non Represented   EESubgroup 01  Monthly(M) OT Exem... Status   Active
  Start      06/04/2006 ⊞ to     12/31/9999

  ┌─ Address ──────────────────────────────────────────────────────┐
  │ Address type        Permanent residence ▣                       │
  │ Street/House no.    123 Elm Lane                                 │
  │ 2nd address line                                                 │
  │ Postal code / city  98498        Lakewood                        │
  │ Country Key         USA                  ▣                       │
  │ Office/region       WA     Washington                            │
  │ County code         27     Pierce County                         │
  │ Telephone number    (253) 555 - 5555                             │
  └─────────────────────────────────────────────────────────────────┘

  ┌─ Communication ────────────────────────────────────────────────┐
  │ Communication 1                                                  │
  │ Communication 2                                                  │
  │ Communication 3                                                  │
  │ Communication 4                                                  │
  └─────────────────────────────────────────────────────────────────┘
```

28. Click 🖫 (Save) to save.

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Create Planned Working Time

29. Complete the following fields:

Field Name	R/O/C	Description
Work schedule rule	R	A description of the duration and composition of employee working time for any given workday. **Example:** FULL
Time Mgmt status	R	The part of the work schedule that an employee is assigned to and signifies how hours are calculated based on the employee's assigned work schedule. **Example:** 9 – Time evaluation of planned times

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Field Name	R/O/C	Description
Additional time ID	C	The indicator on how employee leave will accrue Enter: ▪ 00 for full normal leave accrual (will default if to normal if field is left blank). ▪ 01 for NO leave accrual ▪ 02 for sick leave accrual only
Employment percent	O	The amount of time that an employee works per week in a particular position and is described in terms of a percentage. **Example:** 100.00

30. Click (Enter) to validate the information.

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Planned Working Time (0007)

```
 ⬚
  Infotype  Edit  Goto  Extras  System  Help

  ✓               ⬚   ◁  🖫  ⬅ ⬆ ❌  🖨 🖽 🖾  ⬚ ⬚ ⬚ ⬚  ✳ ⬚  ❓ ⬚

  Create Planned Working Time (0007)

   ⬚  ⬚  👤  🖽  Work schedule

  Personnel No.   20001064      Name     Smith Sallie S
  PersArea   1110  Dept of Personnel           EEGroup  0  Permanent
  PSubarea  0001  Non Represented   EESubgroup  01  Monthly(M) OT Exem…  Status   Active
  Start      06/04/2006  ⬚ To    12/31/9999

  ┌ Work schedule rule ─────────────────────────────────────────────────┐
  │  Work schedule rule        FULL      5-8s: M-F 8 hpd                  │
  │  Time Mgmt status          9 - Time evaluation of planned times   ⬚   │
  │  ☐ Part-time employee                  Additional time ID      00     │
  └─────────────────────────────────────────────────────────────────────┘

  ┌ Working time ───────────────────────────────────────────────────────┐
  │  Employment percent       100.00    ☐ Dyn. daily work schedule        │
  │  Daily working hours        8.00    Min.              Max.            │
  │  Weekly working hours      40.00    Min.              Max.            │
  │  Monthly working hrs      174.00    Min.              Max.            │
  │  Annual working hours    2080.00    Min.              Max.            │
  │  Weekly workdays            5.00                                      │
  └─────────────────────────────────────────────────────────────────────┘
```

31.   Click 🖫 (Save) to save.

Subtypes for infotype "Education" (1)   11 Entries Found

EE	Educ. est. text
01	High School or GED
02	Voc School w/o HS
03	Voc. or Bus. School
04	Some College-2Qtrs+
05	AA Degree
06	Col Grad 4 Yr Degree
07	Some Grad Work
08	MA/MS/MSW Degree
09	Other Master Degree
10	PHD, LLD, MD, JD
11	Less Than HS Grad

11 Entries Found

32. Double-click the employee's highest education level.

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Create Education

Create Education (0022)

Personnel No. 20001064   Name   Smith Sallie S
PersArea 1110 Dept of Personnel   EEGroup 0 Permanent
PSubarea 0001 Non Represented   EESubgroup 01 Monthly(M) OT Exem… Status   Active
Start   [ ] to   [ ]

Educational est.   06   Col Grad 4 Yr Degree
Education/training
Institute/location
Country Key   USA
Certificate
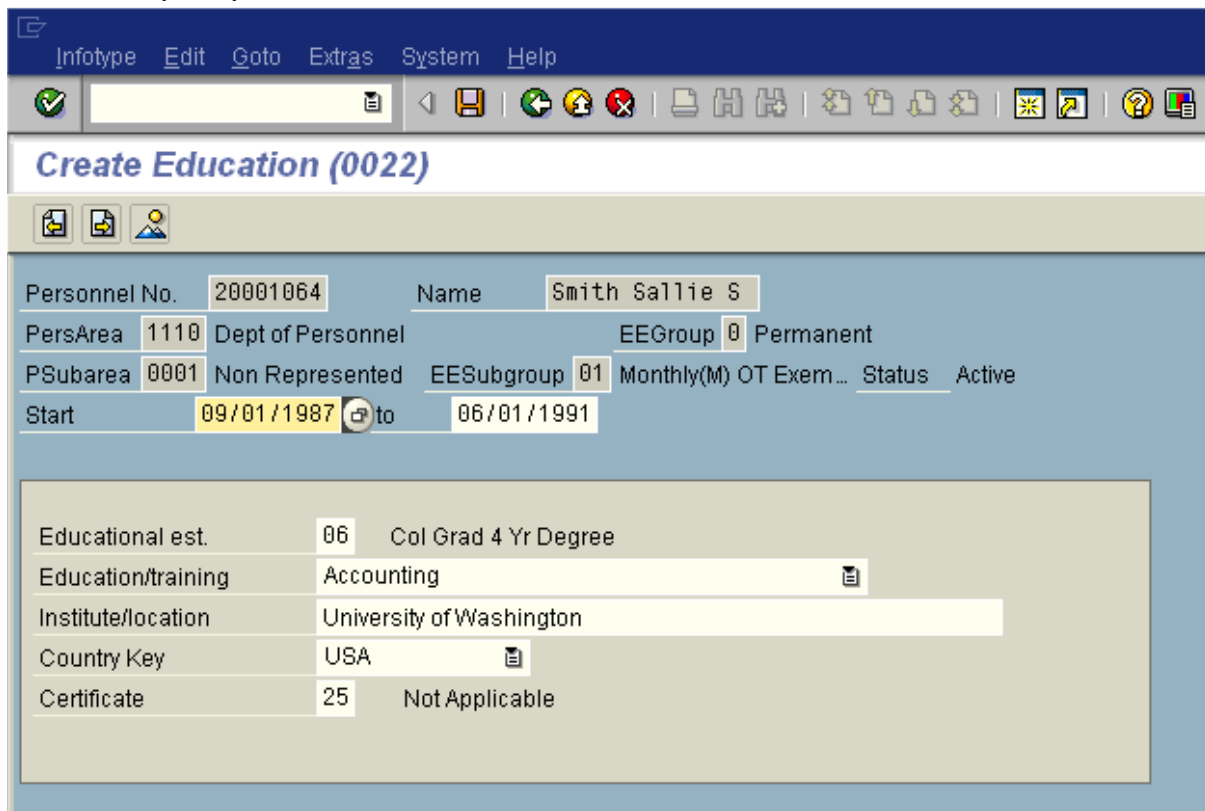
33. Complete the following fields:

Field Name	R/O/C	Description
Start	R	The date on which a record begins. **Example:** 09/01/1987
to	R	The end date of a record, transaction, or search. **Example:** 06/30/1991
Education/training	O	The type of education and/or training the employee/applicant has acquired at a given educational institution. **Example:** Accounting
Institute/location	O	The name of educational institution attended. **Example:** University of Washington
Certificate	R	The type of leaving certificate (e.g. high school diploma, university degree) the employee or applicant has acquired at a given institution. **Example:** 25

34. Click (Enter) to validate the information.

Education (0022)

35. Click ![Save](save icon) (Save) to save.

Change Date Specifications

The date types for Anniversary Date, Appointment Date, Original Hire Date, Seniority Date, Unbroken Service Date and Personal Holiday Eligibility will default in to the new hire date.

- The *Prsnl Holiday/Elgblty* (Personal Holiday Eligibility) is the date an employee is eligible to take a personal holiday.

    – The *Prsnl Holiday/Elgblty* will default to the new hire date. If the employee is not eligible to take a personnel holiday when they start employment, you will need to change the date to when they are eligible.

- In HRMS, there are a limited number of date types to enter into Date Specifications. You are limited to 12 date types for each record.

36. Create the date type for *Vac Lv Frozen Up To.*

This is the date the employee will be eligible to take vacation leave. It is date type 09.

37. Click in the Date type field to select the match code.

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Date type

DT	Date type
01	Anniversary Date
02	Appointment Date
03	Original Hire Date
04	Prior PID
05	Seniority Date
06	Separation Eff. Date
07	Unbroken Srvc. Date
08	WMS Review Date
09	Vac Lv Frozen UpTo
10	Sick Lv Frozen UpTo
11	Person group entry
12	Commission Date
13	Commission Tenure Dt
14	Other Agncy Comm Dt
15	Length of service
16	JEV Begin Date
17	JEV End Date
18	Prsnl HolidayElgblty
19	OriginalCommissionDt

Date type (1) 129 Entries Found

Restrictions

129 Entries Found

38. Double click `09 Vac Lv Frozen UpTo` .

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Date Specifications

39. In the date field enter the date the employee will be eligible to use vacation leave.

Example: 12/04/2006

40. Click (Enter) to validate the information.

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Date Specifications

41. Click 🖫 (Save) to save.

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Create Additional Personal Data

Create Additional Personal Data (0077)

Personnel No.	20001064	Name	Smith Sallie S
PersArea	1110 Dept of Personnel		EEGroup 0 Permanent
PSubarea	0001 Non Represented	EESubgroup 01 Monthly(M) OT Exem… Status	Active
Start	06/04/2006 To	12/31/9999	

Additional Personal Data

Ethnic origin

Ethnicity(New)

Race Data

✓ Race Category

☐ White
☐ Black
☐ American Indian/Alaskan Native
☐ Asian
☐ Native Hawaiian/PI

Military status

☐ Exempt from EEO

Veteran Status
☐ Special disabled veteran
☐ Vietnam-era veteran
☐ Other veteran
☐ Newly separated veteran
☑ Non-veteran

Disability
☐ Disability
Disability Date
Date Learned

42. Complete the following fields:

Field Name	R/O/C	Description
Ethnic origin	O	The employee's ethnic group. It is used in countries which require this type of reporting by law. **Example:** Black
Ethnicity(New)	O	The EEO coded field allows you to group employees by ethnic origin. It is used in countries which require this type of reporting by law. **Example:** Not Hispanic/Latino
Military status	O	The branch of service the employee served/serves in. ❌ If the employee has not served in the military you can select Non/Unspec Vet's Status or leave the field blank. **Example:** Rtrd VtnmVt > 500

43. In the **Race Data** group, click the checkbox to the left of appropriate **Race Category** to select.

44. If applicable, choose a **Veteran Status**.

ℹ   Non-Veteran is the default **Veteran Status**, if you select another **Veteran Status**, then you must uncheck the Non-Veteran status.

45. If applicable, choose a **Disability**.

46. Click 🗹 (Enter) to validate the information.

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Create Additional Personal Data

47. Click 🖫 (Save) to save.

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Create Military Service

This infotype will only appear if a Military status was chosen on the *Additional Personal Data* infotype.
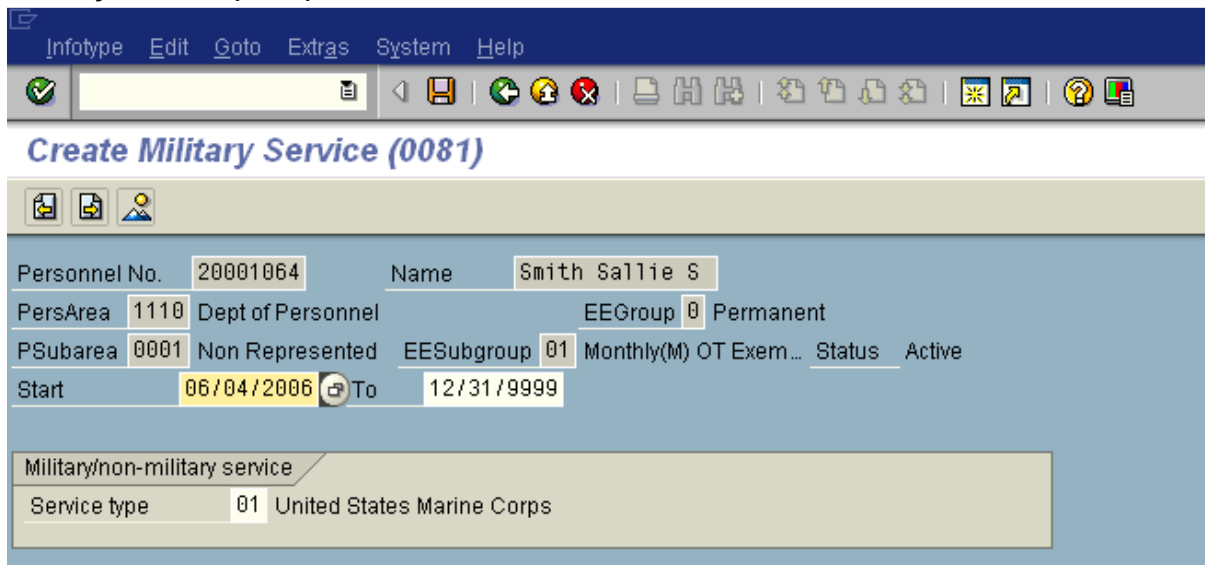
Do not save this infotype if the employee **has not** served in the Military, click (Next Record) or (Cancel) to move to the *Basic Pay* Infotype (0008) Step 54.

48. Complete the following field:

Field Name	R/O/C	Description
Service type	R	This defines what type of service a state employee is performing (i.e. seasonal, temporary, in-training, etc.).
		Example: 01

49. Click (Enter) to validate the information.

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Military Service (0081)

50. Click 🖫 (Save) to save.

Create Time Specification/Employ. Period

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51. Complete the following fields:

Field Name	R/O/C	Description
Start	R	The start date the employee's Military Service. **Example:** 01/03/2000
To	R	The end date of the employee's Military Service. **Example:** 7/11/2005

You would get the Start and To date from the employee's DD214 paperwork.

52. Click   (Enter) to validate the information.

Time Specification/Employ. Period (0552)

53. Click   (Save) to save.

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Create Basic Pay

54. Complete the following field:

Field Name	R/O/C	Description
Reason	R	This is a specific reason for performing an action or maintaining an infotype. **Example:** 19

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Field Name	R/O/C	Description
Next Increase	O	The date of the employee's next pay increase.
		If you leave the date blank, the employee will not receive a pay increase.
		Example: 01/25/05

55. Click (Enter) to validate the information.

Basic Pay (0008)

Infotype Edit Goto Wage types Extras System Help

Create Basic Pay (0008)

Salary amount   Payments and deductions

Personnel No.	20001064	Name	Smith Sallie S

PersArea 1110 Dept of Personnel   EEGroup 0 Permanent
PSubarea 0001 Non Represented   EESubgroup 01 Monthly(M) OT Exem… Status   Active
Start   06/04/2006   to   12/31/9999

Subtype   0   Basic contract

Pay scale

Reason	01	Periodic Increment	Capacity util. level	100.00
PS type	01	WFSE	Work hours/period	87.00 Semi-monthly
PS area	01	Standard Progression	Next increase	12/04/2006
PS group	42	Level A	Annual salary	31,284.00 USD

Wa...	Wage Type Long Text	O..	Amount	Curr...	I..	A..	Number/unit	Unit	
1003	Pay Period Salary		1,303.50	USD	I	✔			
				USD		☐			
				USD		☐			
				USD		☐			
				USD		☐			
				USD		☐			
				USD		☐			

IV 06/13/2006 - 12/31/9999   1,303.50 USD

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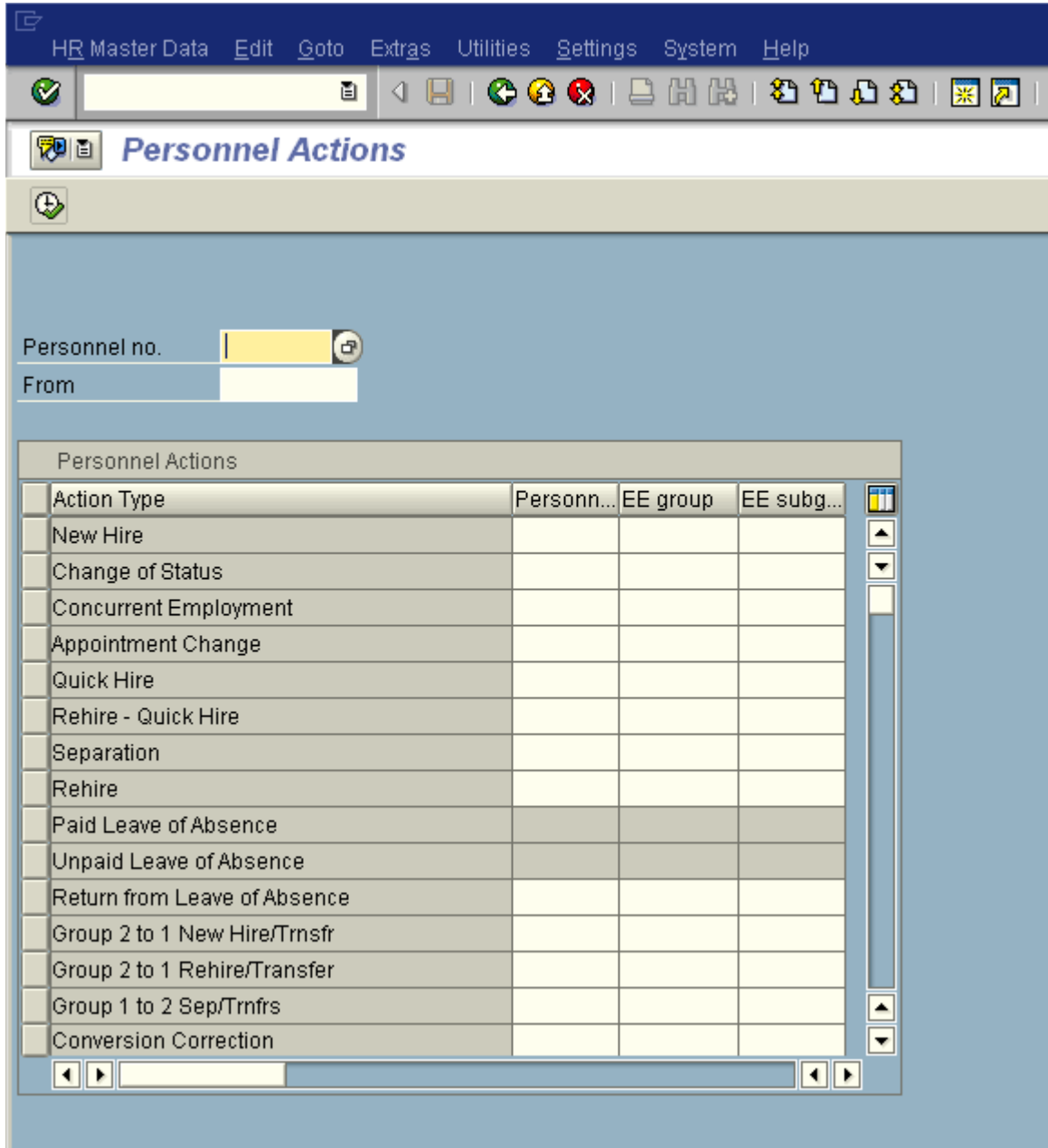
56. Click ![Save] (Save) to save.

> ⚠️ For the ***Personnel Administration Processor***, this will mark the end of the New Hire action. After saving, click ![exit] to exit the action and transfer the New Hire Information Packet to the ***Payroll Processor*** who will complete the action.

Personnel Actions

| HR Master Data | Edit | Goto | Extras | Utilities | Settings | System | Help |

Personnel Actions

Personnel no. | |
From | |

Personnel Actions			
Action Type	Personn...	EE group	EE subg...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Paid Leave of Absence			
Unpaid Leave of Absence			
Return from Leave of Absence			
Group 2 to 1 New Hire/Trnsfr			
Group 2 to 1 Rehire/Transfer			
Group 1 to 2 Sep/Trnfrs			
Conversion Correction			

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57. Enter the employee's personnel number.

> ***Payroll Processor*** –Do not put a "From" date in the field prior to executing the transaction. If you entered a "From" date click (Back) and delete the date and then click (Execute).

58. Click (Enter) to validate the information.

Personnel Actions

59. Click (Execute) to start the transaction.

Actions (0000)

```
┌─────────────────────────────────────────────────────────────────────────┐
│  Infotype   Edit   Goto   Extras   System   Help                         │
│                                                                           │
│  ⊘  [                    ▤ ]  ◁ 🖫 | ⦿⦿⦾ | 🖫🔍🔍 | ... | ... | ⊞⊡ | ⑦🗗  │
│                                                                           │
│  Change Actions (0000)                                                    │
│                                                                           │
│  ⊡ ⊡ 🔍 | ⊕ Execute info group   ✎ Change info group                     │
│                                                                           │
│  Pers.No.      20001064                                                   │
│  Name       Smith Sallie S                                                │
│  PersArea   1110  Dept of Personnel            EEGroup 0 Permanent        │
│  PSubarea   0001  Non Represented   EESubgroup 01 Monthly(M) OT Exem…      │
│                                                          Status   Active   │
│  Start        06/04/2006   to    12/31/9999  Chng 06/13/2006 CHYLYNNH     │
│                                                                           │
│  ┌ Personnel action ─────────────────────────────────────────────────┐  │
│  │ Action Type        New Hire                         ▤              │  │
│  │ Reason for Action   02 🗗 Probationary Appointment                 │  │
│  └────────────────────────────────────────────────────────────────────┘  │
│                                                                           │
│  ┌ Status ───────────────────────────────────────────────────────────┐  │
│  │ Employment         Active                           ▤              │  │
│  └────────────────────────────────────────────────────────────────────┘  │
│                                                                           │
│  ┌ Organizational assignment ───────────────────────────────────────┐    │
│  │ Position          60004597    HR Consult                         │    │
│  │ Personnel area    1110       Dept of Personnel                   │    │
│  │ Employee group    0          Permanent                           │    │
│  │ Employee subgroup 01         Monthly(M) OT Exempt                │    │
│  └──────────────────────────────────────────────────────────────────┘    │
│                                                                           │
│  ┌ Additional actions ───────────────────────────────────────────────┐  │
│  │ Start Date  Act.  Action type       ActR  Reason for acti      ⊞ │  │
│  │ 06/04/2006  U0    New Hire          02    Probationary Appoint… │  │
│  └────────────────────────────────────────────────────────────────────┘  │
└─────────────────────────────────────────────────────────────────────────┘
```

60. Click ⊕ Execute info group .

61. An information pop up box will appear informing you that "This entry will delete a record." Click ✔ (Enter) to continue.

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62. An Execute info group pop up box will appear informing you that "Warning: Personnel action infotype not saved with 'execute info group' function! Click [✔ Continue].

> ℹ The **Personnel Processor** has already saved this infotype so it is ok to continue.

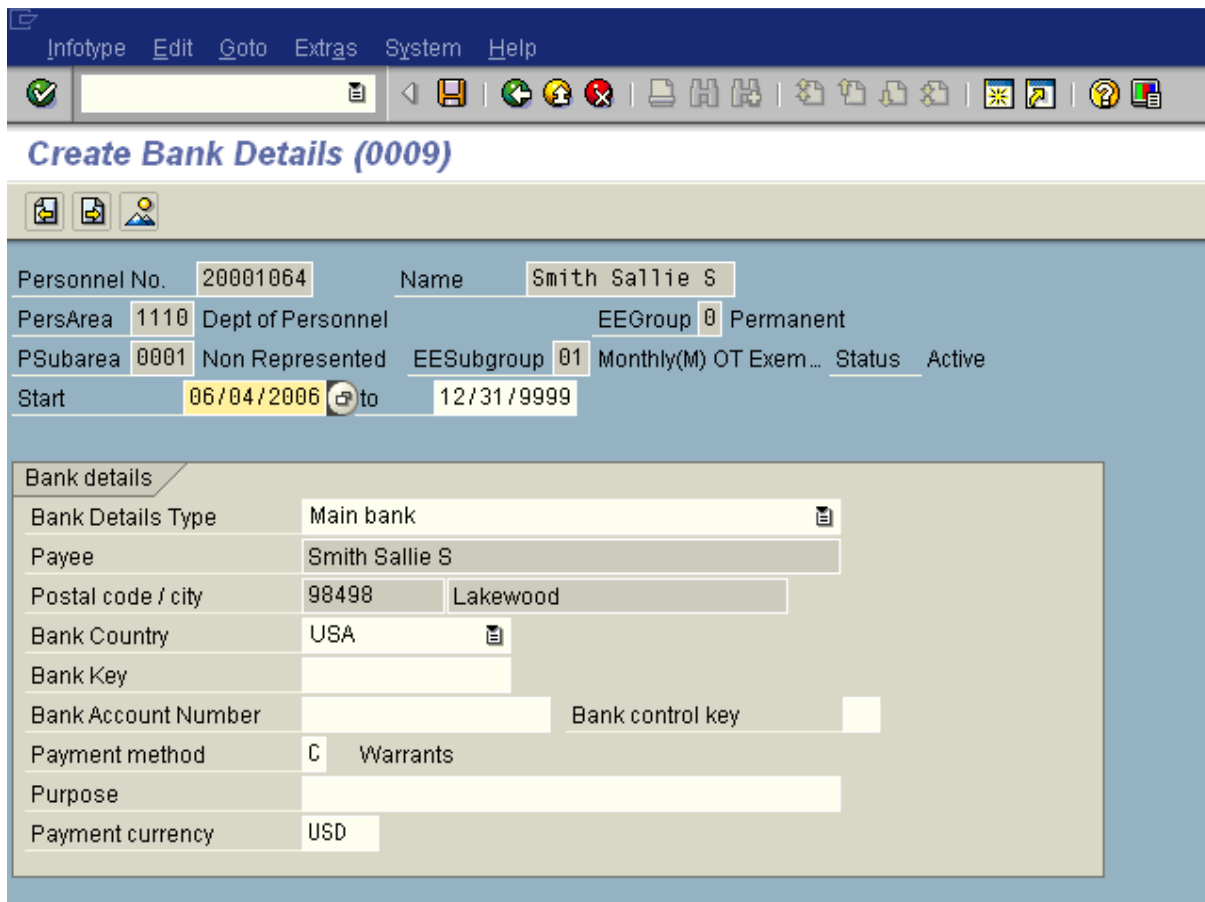**63.** Click ☑ (Next Record) until you reach Subtypes for Infotype Education click the **X** in the right hand corner of the box to by-pass this infotype. Continue to click ☑ (Next Record) until reach *Create Bank Details* Infotype (0009).

Create Bank Details

| Infotype | Edit | Goto | Extras | System | Help |

Create Bank Details (0009)

Personnel No.	20001064	Name	Smith Sallie S
PersArea	1110	Dept of Personnel		EEGroup	0	Permanent
PSubarea	0001	Non Represented	EESubgroup	01	Monthly(M) OT Exem...	Status	Active
Start	06/04/2006	to	12/31/9999

Bank details

Bank Details Type	Main bank
Payee	Smith Sallie S
Postal code / city	98498	Lakewood
Bank Country	USA
Bank Key	
Bank Account Number		Bank control key	
Payment method	C	Warrants
Purpose	
Payment currency	USD

> ℹ If the employee is to receive a paper check, proceed to Step 56. If the employee would like their pay check deposited in a bank of their choice, complete the field listed below.

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64. As required, complete/review the following fields:

Field Name	R/O/C	Description
Bank Key	C	The bank's routing number. ⓘ Leave blank for a Warrants payment method. **Example:** 12345678
Bank Account Number	C	The employee's bank account number. ⓘ Leave blank for a Warrants payment method. **Example:** 123456789
Bank Control Key	C	The type of bank account - for example, savings or checking. ⓘ Enter *01* for Checking or *02* for Savings. Do not leave this field blank. **Example:** 02
Payment method	R	This is the manner in which an employee is compensated, either by warrant or direct deposit. ⓘ For direct deposit, use D. **Example:** C

65. Click 🗸 (Enter) to validate the information.

❌ You must save the Bank Details infotype to accept the default of a warrant. If you do not save this infotype, the employee will red line on payroll reports and will not process through payroll until the Bank Details infotype is created and saved.

66. Click 🖫 (Save) to save.

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Create Recurring Payments/Deductions

If no information has been provided for recurring payments or deductions, skip this infotype

by clicking (Next record).

67. Complete the following fields:

Field Name	R/O/C	Description
Wage type	R	This is an object in Payroll and Personnel Administration which stores amounts or time units that are used to calculate pay and deductions, store results, and determine statistics. It separates amounts and time units for various business processes. It enables the system to process amounts and time units in different ways during the payroll run. **Example:** 2703

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Field Name	R/O/C	Description
Amount	R	The total dollar value of a wage type. (Not Needed when Wage type is a percentage). **Example:** 6.00
Payment Model	C	The time pattern in which deductions are withdrawn and payments made. **Example:** WA01

68. Click (Enter) to validate the information.

Recurring Payments (0014)

If the employee has recurring payments /deductions, go to **PA30** and follow the procedures Create a Recurring Payment or Create Recurring Deduction after performing the new hire action.

69. Click (Save) to save.

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Create Unemployment State

70. Complete the following fields:

Field Name	R/O/C	Description
Tax authority	R	The tax authority for employment. **Example:** WA
Worksite	R	The county of employment. **Example:** 34

71. Click ![Enter] (Enter) to validate the information.

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Unemployment State (0209)

72. Click (Save) to save.

Create Withholding Info W4/W5 US

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73. Complete the following fields:

Field Name	R/O/C	Description
Filing Status	R	The status elected by the employee for federal tax withholding. **Example:** 01
Allowances	R	The number of dependents claimed for tax filing purposes. It affects the amount of taxes withheld from an employee's paycheck. **Example:** 01
Add.withholding	O	An amount designated by the employee to be withheld from his/her check above the amount that will be taken due to filing status. **Example:** 100.00
Tax exempt indicator	C	The indicator which determines if the employee is exempt from taxation. Using **Tax Exempt indicator Y** will make the wages exempt from taxation and not reportable to the IRS. Using **Tax Exempt indicator R** will make the wages exempt from taxation and earnings are reported to the IRS. **Example:** Y

74. Click (Enter) to validate the information.

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Create Withholding Info W4/W5 US

75. Click 🖫 (Save) to save.

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Create Add. Withh. Info. US

76. Complete the following fields:

Field Name	R/O/C	Description
Empl. override group	R	This is the Worker's Compensation code that an employee holds for a particular job. **Example:** 0034

77. Click (Enter) to validate the information.

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Create Add. Withh. Info. US

78. Click ⊞ (Save) to save.

⚠️ For the **Payroll Processor**, this will mark the end of the New Hire action. After saving, click

🔼 to exit the action and transfer the New Hire Information Packet to the **Benefits Processor** who will complete the action.

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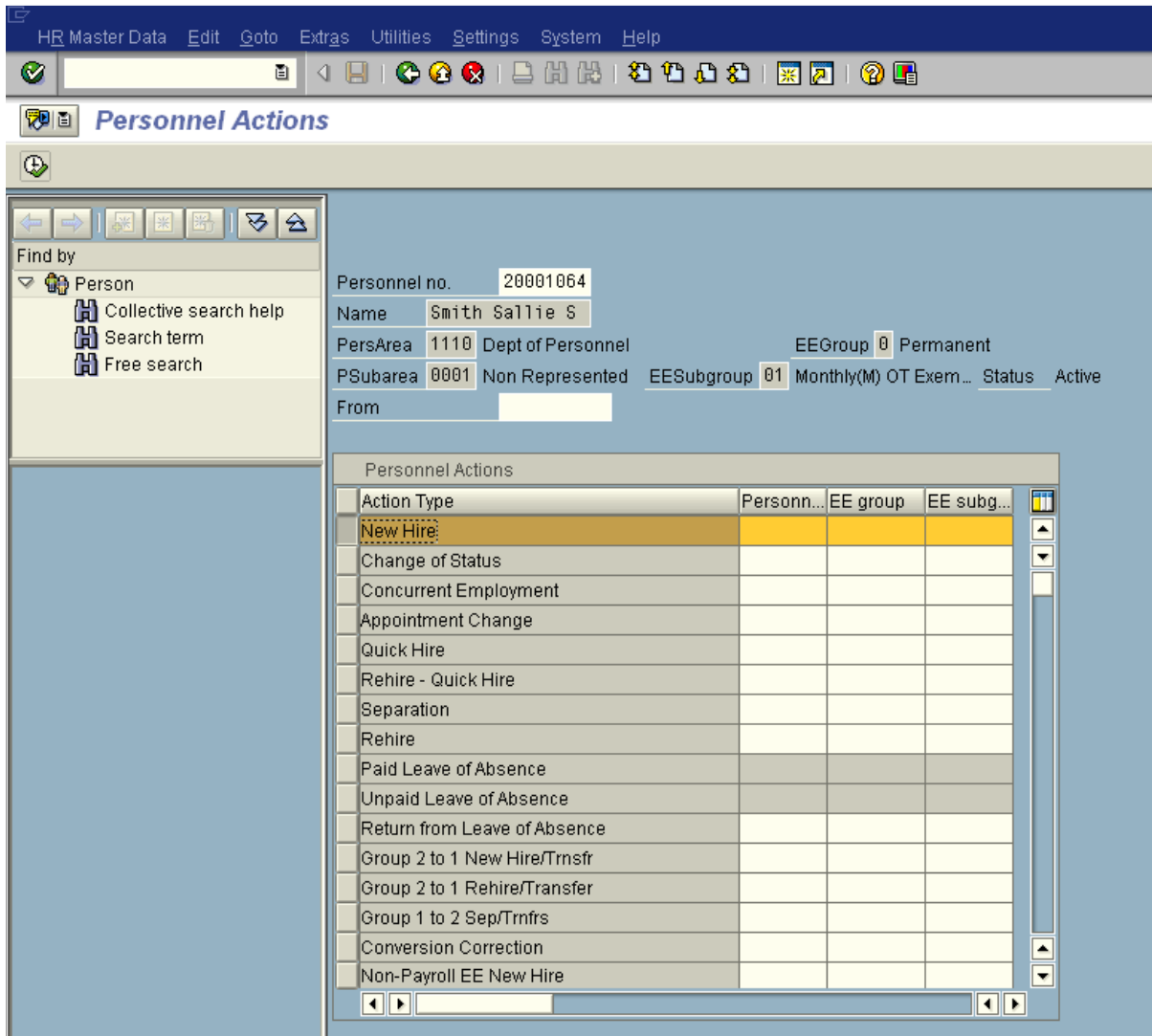| File name:	**Version:** SME Approved Script	SAP Parent
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Personnel Actions

79.   Enter the employee's personnel number.

> ***Benefits Processor*** –Do not put a "From" date in the field prior to executing the transaction. If you entered a "From" date click (Back) and delete the date and then click (Execute).

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80. Click (Enter) to validate the information.

Personnel Actions

HR Master Data	Edit	Goto	Extras	Utilities	Settings	System	Help

Personnel Actions

Find by
▽ Person
  Collective search help
  Search term
  Free search

Personnel no.	20001064				
Name	Smith Sallie S				
PersArea	1110	Dept of Personnel		EEGroup 0 Permanent	
PSubarea	0001	Non Represented	EESubgroup 01 Monthly(M) OT Exem… Status	Active	
From					

Personnel Actions

Action Type	Personn...	EE group	EE subg...	
New Hire				
Change of Status				
Concurrent Employment				
Appointment Change				
Quick Hire				
Rehire - Quick Hire				
Separation				
Rehire				
Paid Leave of Absence				
Unpaid Leave of Absence				
Return from Leave of Absence				
Group 2 to 1 New Hire/Trnsfr				
Group 2 to 1 Rehire/Transfer				
Group 1 to 2 Sep/Trnfrs				
Conversion Correction				
Non-Payroll EE New Hire				

81. Click (Execute) to start the transaction.

Actions (0000)

82. Click ⏱ Execute info group .

83. An information pop up box will appear informing you that "This entry will delete a record." Click ✔ (Enter) to continue.

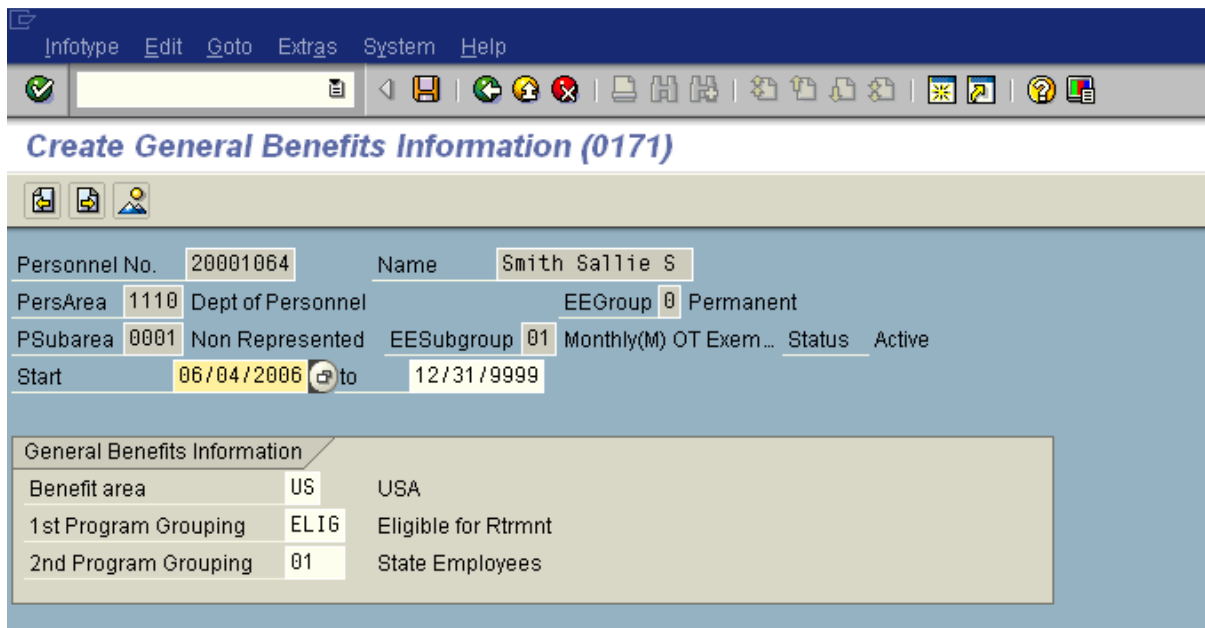| **File name:**	**Version:** SME Approved Script	SAP Parent
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84. An Execute info group pop up box will appear informing you that "Warning: Personnel action infotype not saved with 'execute info group' function! Click ✔ Continue.

ⓘ   The **Personnel Processor** has already saved this infotype so it is ok to continue.

85. Click 🔲 (Next Record) until you reach Subtypes for Infotype Education click the **X** in the right hand corner of the box to by-pass this infotype. Continue to click 🔲 (Next Record) until reach *Create General Benefits Information* Infotype (0171).

Create General Benefits Information

ⓘ   The **1st Program Grouping** defaults in as eligible. To verify that the position is eligible use transaction code **PO13D**, click the gray box to the left of *Acct Assignment Features* infotype. If there is an X in the box next to retirement eligible then the position is retirement eligible. If the box is blank the position is not retirement eligible.

The value in the **2nd Program Grouping** field defaults from appointment information in the *Organizational Assignment* infotype (0001).

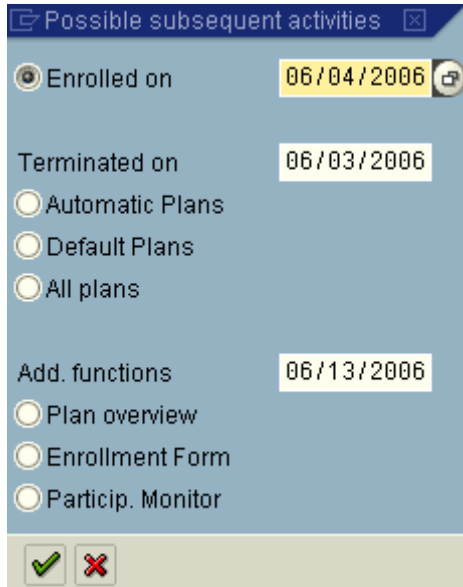You will have to change the **2nd Program Grouping** field if:

• An employee chooses a different plan.

• The Employee Type defaults to a code not consistent with the System/Plan set up at hiring time.

• An employee changes positions and wants to continue contributing to the System/Plan from his previous position rather than the one that defaults with the new position.

For a list of valid type codes for each retirement system, see The Employer Handbook - Type Codes.

86. Click ✔ (Enter) to validate the information.

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87. Click (Save) to save.

Possible subsequent activities

88. Click accept to accept.

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Enrollment

89.   Click [Get offer] .

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Enrollment

90. Click the appropriate Savings Plan.

By using the **PA40** transaction code, HRMS will identify all plans that the employee is eligible to participate in.

For a new PERS 2 employee, upon completion of the enrollment processor, immediately update the Plan choice code on the *Savings Plan* (0169) infotype to place the employee on the 70-day/90-day default report. See OLQR procedure, Retirement Plan Choice Code 90 day period (New Hire).

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Maintain Savings Plan

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91. Complete the following field:

Field Name	R/O/C	Description
Percentage	R	This is a field used to store a percentage amount for the retirement deduction. ❌ **Do not leave the percentage field bank or HRMS will not take any deductions for retirement.** ℹ️ If you do not know the correct plan contribution percentage, HRMS can prompt you. Click in the percentage field and enter any number (example: 2) and press the enter button on your keyboard. You will receive an 🔴 Error message in the status bar telling you what the correct contribution percentage is for the selected plan. **Example:** 2.25

92. Click 🕐 Accept .

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Enrollment

93. Click [Enroll] .

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Confirmation of Selected Actions

Confirmation of Selected Actions				☒
List of Plans				
Activity	Plan	From	To	
Create	PERS 2	06/04/2006	12/31/9999	▲ ▼
				▲ ▼

  ⊕ Enroll ✖ Cancel

94.   Click   ⊕ Enroll .

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Enrollment

95. Click [Continue] to continue or click [Confirmation] to print confirmation.

96. Click to return to the previous screen. The following screen displays:

Possible subsequent activities
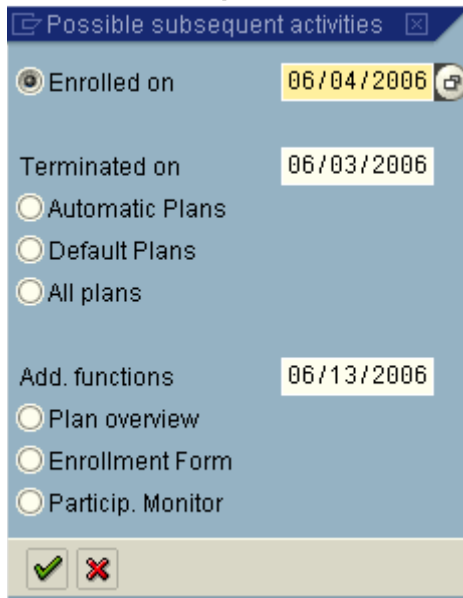
97. Click to cancel.

98. You have completed this transaction.

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Result

You have hired a new employee into HRMS.

Comments

If the employee chooses to stay in Plan 2, see the OLQR procedure, Retirement Plan Choice – 90-day Section Period Chose Plan 2

If the employee chose Plan 3, see the OLQR procedure, Retirement Plan Choice – 90-day Section Period Chose Plan 3

One of these procedures must be completed when the employee submits their completed DRS member information form designating their choice during the 90-day choice period.

The Employee that is enrolled in Plan 2 will default to P3, Rate A - WSIB investment manager.

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